2014 Alberta Tourism Market Monitor

Alberta Culture and Tourism

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Air Passengers 2014 (000's of enplanements and deplanements) [1]													
Edmonton International Total	583.9p	567.4p	624.8p	619.7p	597.7p	593.2p	**666.9r**	708.8p	**591.5r**	**597.7p**			6,151.7p
Per cent change from 2013	5.8%	4.8%	5.0%	8.3%	4.2%	6.5%	**5.9%**	6.9%	**6.1%**	**5.2%**			5.9%
Domestic	409.1p	392.3p	427.1p	439.4p	459.9p	478.1p	**536.2r**	572.1p	**479.0r**	**466.3p**			4,659.4p
Per cent change from 2013	5.1%	4.3%	2.9%	6.6%	2.3%	3.8%	**3.1%**	4.8%	**5.5%**	**4.7%**			4.3%
Transborder	118.6p	123.5p	140.1p	131.0p	109.2p	91.8p	104.0p	107.8p	91.1p	**111.3p**			1,128.4p
Per cent change from 2013	6.4%	6.0%	12.4%	14.0%	10.6%	15.9%	15.1%	10.7%	4.6%	**1.8%**			9.6%
International	56.2p	51.7p	57.6p	49.3p	28.6p	23.3p	26.7p	28.8p	21.4p	**20.1p**			363.9p
Per cent change from 2013	10.5%	5.4%	4.1%	9.0%	12.8%	34.4%	38.3%	44.7%	28.6%	**45.3%**			16.3%
Calgary International Total	1,172.0r	1,153.2r	1,248.1r	1,255.1r	1,225.5p	1,264.8r	1,445.6r	**1,529.7r**	**1,263.6p**				11,557.6p
Per cent change from 2013	7.3%	9.4%	5.1%	9.7%	6.5%	8.9%	6.3%	**6.3%**	**6.1%**				7.2%
Domestic	791.5r	771.6r	821.1r	869.3r	868.1p	915.3r	1,051.6r	**1,118.2r**	**913.3p**				8,120.1p
Per cent change from 2013	6.4%	9.1%	4.4%	10.5%	5.9%	9.3%	7.0%	**7.7%**	**6.5%**				7.4%
Transborder	250.1p	260.5p	291.4p	269.0p	249.0p	236.7p	274.3p	282.3p	**242.3p**				2,355.4p
Per cent change from 2013	8.7%	9.7%	8.3%	9.5%	7.9%	8.5%	5.0%	1.2%	**4.0%**				6.9%
International	130.5p	121.1p	135.6p	116.8p	108.5p	112.8p	119.6r	**129.2r**	**108.0p**				1,082.1p
Per cent change from 2013	10.1%	10.5%	2.3%	4.1%	7.7%	6.9%	3.3%	**6.1%**	**6.8%**				6.3%
Highway Count 2014 (000's of vehicles) [2]													
Hwy 1 -Sask border w-bound	55.9p	56.0p	62.3p	71.5p	77.3p	83.6p	104.0p	**110.5p**	**79.2p**				700.3p
Per cent change from 2013	1.1%	0.0%	-2.2%	9.2%	-1.7%	8.2%	0.9%	**1.7%**	**-1.6%**				1.7%
Hwy 1 - Banff Pk Gate (2-way)	473.0p	449.1p	499.1p	532.4p	586.2p	659.8p	881.7p	**982.6p**	**645.7p**				5,709.6p
Per cent change from 2013	3.4%	-4.9%	-6.8%	15.8%	1.1%	44.1%	12.7%	**4.8%**	**-1.3%**				7.0%
Hwy 16 - Jasper Pk Gate (2 way)	91.8p	84.7p	105.2p	124.6p	139.5p	162.0p	224.4p	**264.8p**	**154.4p**				1,351.4p
Per cent change from 2013	2.1%	-2.0%	-6.8%	16.1%	2.3%	-8.1%	5.3%	**7.1%**	**-1.0%**				2.0%
Hwy 16 - Jct #897 w-bound	169.6p	157.6p	182.7p	187.5p	200.7p	200.0p	219.9p	**223.3p**	**202.5p**				1,743.8p
Per cent change from 2013	2.8%	-1.6%	3.7%	4.8%	0.2%	0.7%	2.3%	**0.8%**	**0.3%**				1.5%
National Park Attendance (000's of person visits) 2014 [3] Does not include Group Tours.													
Banff	171.0p	164.6p	184.1p	231.3p	258.3p	300.0p	560.9p	633.0p	397.9p				2,901.1p
Per cent change from 2013	3.6%	2.9%	-7.2%	19.8%	2.0%	41.9%	9.5%	4.8%	2.3%				8.0%
Jasper	49.8p	48.3p	59.7p	142.1p	161.5p	**190.3p**	**393.6p**	**453.9p**	**275.7p**				**1,774.9p**
Per cent change from 2013	3.7%	-1.8%	-7.3%	17.6%	2.0%	**9.1%**	**7.1%**	**5.6%**	**1.5%**				**5.4%**
Waterton Lakes	6.5p	6.3p	6.3p	11.0p	30.9p	59.8p	**102.5p**	**106.8p**	**53.2p**	**18.4p**			**401.7p**
Per cent change from 2013	1.6%	-17.1%	-27.6%	17.0%	1.3%	-2.0%	**8.6%**	**3.2%**	**-6.7%**	**7.0%**			**1.5%**
Sources: Edmonton International Airport, Calgary International Airport, Alberta Transportation, Parks Canada													

New monthly figures are shown in bold type. Revisions will be bolded. p=preliminary r=revised e=estimate 20-Nov-14

2014 Alberta Tourism Market Monitor

Alberta Culture and Tourism

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Employment (000's of persons) 2014 Seasonally Adjusted [4]													
Accommodation and Food Services	149.2p	148.9p	148.5p	148.9p	149.2p	132.3p	134.1p	131.8p	143.3p	**153.8p**			**144.0p**
Per cent change from 2013	15.5%	14.9%	24.1%	18.0%	13.5%	-0.6%	-0.6%	-5.1%	-1.1%	**5.8%**			**8.0%**
Accommodation Indices 2014 [5]													
Edmonton Occupancy Rate	58.3%	68.2%	74.1%	74.8%	72.9%	69.7%	64.8%	76.3%	**70.8%**				**70.2%**
Point change from 2013	3.5	-2.1	-0.2	-1.1	0.7	-3.8	-0.2	4.7	**-3.6**				**-0.1**
Average Daily Room Rate	$129.90	$133.50	$135.81	$135.34	$135.51	$136.02	$127.73	$133.28	**$136.87**				**$133.03**
Calgary Occupancy Rate	57.9%	63.3%	67.6%	71.3%	71.2%	76.4%	77.7%	79.3%	**79.6%**				**71.8%**
Point change from 2013	-1.8	-3.3	-2.2	-4.4	-3.4	1.1	-4.5	-1.1	**-0.9**				**-2.3**
Average Daily Room Rate	$157.27	$161.74	$160.21	$164.21	$163.50	$184.30	$190.01	$150.26	**$170.95**				**$167.29**
Alberta Resorts Occupancy Rate	38.0%	45.6%	45.1%	46.1%	61.0%	75.9%	87.9%	91.8%	**80.6%**				**63.9%**
Point change from 2013	1.0	1.1	-7.7	3.8	5.6	11.1	9.4	4.7	**2.9**				**3.5**
Average Daily Room Rate	$165.86	$175.65	$167.05	$163.06	$188.85	$241.20	$265.38	$271.53	**$231.32**				**$221.16**
Other Alberta* Occupancy Rate	59.9%	66.4%	67.9%	59.2%	64.4%	67.1%	68.7%	71.0%	**71.7%**				**66.4%**
Point change from 2013	3.6	2.7	3.9	1.4	5.9	3.2	-1.8	0.9	**0.8**				**2.5**
Average Daily Room Rate	$128.41	$129.89	$129.71	$127.41	$127.96	$130.42	$130.13	$130.84	**$132.67**				**$130.41**
Total Alberta (excluding Resorts) Occupancy Rate	58.8%	65.9%	69.5%	67.2%	68.8%	70.6%	70.3%	75.0%	**73.8%**				**69.1%**
Point change from 2013	2.0	-0.6	0.8	-1.2	1.6	0.6	-2.1	1.5	**-0.9**				**0.4**
Average Daily Room Rate	$137.42	$140.16	$140.38	$142.06	$141.46	$149.38	$149.08	$137.75	**$146.20**				**$142.69**
Food Services and Drinking Places 2014 ($Millions) unadjusted [6]													
Total Receipts for Alberta	$648.7r	$628.3r	$715.3r	$713.9r	$758.3r	**745.0r**	**764.8r**	**777.6p**					**719.0p**
Per cent change from 2013	5.3%	2.7%	5.2%	8.2%	8.1%	**6.4%**	**6.7%**	**8.1%**					**6.4%**
Historic Sites and Museums 2014 (000s of person visits) [7]													
Visitor Attendance	23.5p	39.8p	38.5p	47.5p	77.5p	115.5p	160.5p	188.9p	59.4p	**40.1p**			**791.2p**
Per cent change from 2013	10.9%	-6.8%	-9.7%	11.4%	3.8%	14.3%	1.3%	4.4%	-14.3%	**-0.2%**			**2.2%**
Sources: Statistics Canada, PKF Consulting inc, Alberta Culture													

New monthly figures are shown in bold type. Revisions will be bolded. p=preliminary r=revised e=estimate 20-Nov-14

Definitions of Indicators

1. Air Passengers - Numbers are preliminary estimates of the number of air passengers enplaning and deplaning at the Edmonton International and Calgary International Airports.
Source: Edmonton International Airport and Calgary International Airport Websites
2. Highway Traffic: These data are monthly totals. The monthly average daily traffic (average number of vehicles per day) is calculated by dividing the monthly total by the number of days in the month passing the counter locations and in the dierction indicated for a particular month. Automatic Traffic Recorders counts all vehicles by direction. Year-to-date is a cumulative
Source: Alberta Transportation's Automatic Traffic Recorders (ATR).
3. National Park Attendance - Attendance is reported as the number of visits to National Parks in Alberta. Data are preliminary unless otherwise noted.
Beginning in 2004 the monthly figures for Banff National Park and Jasper National Park reflect independent travellers only, and do not include people travelling as part of a tour group. The tour group data, however, are included in the annual total.
Source: Parks Canada

4. Employment Food and Accommodation Sector - The employment figure represents all persons who worked for pay or profit or unpaid work in the food services and accommodation sector, including businesses or other ventures owned or operated by a related family member(s) during the reference period of the survey. The year-to-date total is an average for the year.
Source: Statistics Canada, Labour Force Survey
5. Accommodation Indices - Occupancy rates and average daily room rates are based on monthly averages of all reporting hotels, motels and motor hotels in each designated region. Alberta Resorts includes the resort communities of Banff, Lake Louise, Kananaskis, Canmore and Jasper.
Source: PKF Consulting Inc. with reproduction and use of information subject to PKF Disclaimer and Restrictions as detailed at www.pkfcanada.com
6. Food Services and Drinking Places - The monthly survey of Food Services and Drinking Places provides estimates of the value of sales and the number of locations of restaurants, caterers, and drinking places by province and by industry at the North American Industry Classification System (NAICS) four-digit level. Includes total receipts from restaurants, caterers and taverns for chain and independent establishments. The target population is the 3 digit NAICS level of 722, which includes: Full-service restaurants, limited service eating places, special food places and drinking places. The year-to-date total is an average for the year.
Source: Statistics Canada, Food Services and Drinking Places
7. Historic Sites and Museums - Visitor attendance figures are monthly totals based on fifteen historic sites, the Royal Alberta Museum, the Royal Tyrrell Museum of Paleontology, and the Tyrrell Field Station.
Source: Alberta Culture and Tourism, Heritage Division.

Alberta Tourism Market Monitor

Monthly Update

November 2014

For the first nine months of 2014, the occupancy rate for Alberta (excluding resorts) was 69.1%, up +0.4 points compared to 2013 (68.7%). The average daily room rate for Alberta (excluding resorts) for the first nine months of 2014 was $142.69, up +3.7% compared to 2013 ($137.61).

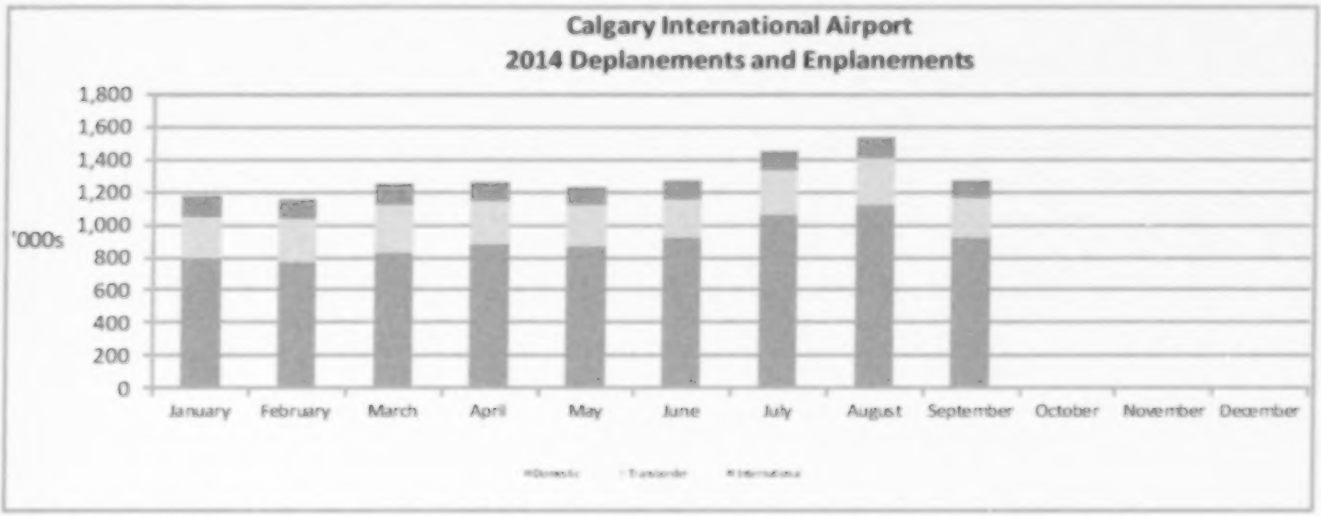
	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Y-T-D Total 2014
Edmonton Occupancy Rate	58.3%	68.2%	74.1%	74.8%	72.9%	69.7%	64.8%	76.3%	**70.8%**				**70.2%**
Point Change from 2013	3.5	-2.1	-0.2	-1.1	0.7	-3.8	-0.2	4.7	**-3.6**				**-0.1**
Average Daily Room Rate	$129.90	$133.50	$135.81	$135.34	$135.51	$136.02	$127.73	$133.28	**$136.87**				**$133.03**
Variance from 2013	6.1%	6.4%	6.6%	5.6%	6.5%	5.9%	3.1%	7.8%	**6.4%**				**5.5%**
Calgary Occupancy Rate	57.9%	63.3%	67.6%	71.3%	71.2%	76.4%	77.7%	79.3%	**79.6%**				**71.8%**
Point Change from 2013	-1.8	-3.3	-2.2	-4.4	-3.4	1.1	-4.5	-1.1	**-0.9**				**-2.3**
Average Daily Room Rate	$157.27	$161.74	$160.21	$164.21	$163.50	$184.30	$190.01	$150.26	**$170.95**				**$167.29**
Variance from 2013	1.2%	2.7%	5.0%	1.6%	1.0%	8.1%	1.6%	0.6%	**4.5%**				**3.0%**
Alberta Resorts Occupancy Rate	38.0%	45.6%	45.1%	46.1%	61.0%	75.9%	87.9%	91.8%	**80.6%**				**63.9%**
Point Change from 2013	1.0	1.1	-7.7	3.8	5.6	11.1	9.4	4.7	**2.9**				**3.5**
Average Daily Room Rate	$165.86	$175.65	$167.05	$163.06	$188.85	$241.20	$265.38	$271.53	**$231.32**				**$221.16**
Variance from 2013	3.0%	4.7%	-1.3%	3.7%	5.0%	7.1%	7.6%	8.6%	**3.6%**				**6.2%**
Other Alberta* Occupancy Rate	59.9%	66.4%	67.9%	59.2%	64.4%	67.1%	68.7%	71.0%	**71.7%**				**66.4%**
Point Change from 2013	3.6	2.7	3.9	1.4	5.9	3.2	-1.8	0.9	**0.8**				**2.5**
Average Daily Room Rate	$128.41	$129.89	$129.71	$127.41	$127.96	$130.42	$130.13	$130.84	**$132.67**				**$130.41**
Variance from 2013	3.3%	3.7%	3.0%	2.3%	3.4%	2.6%	2.7%	3.7%	**4.5%**				**3.3%**
Total Alberta (excluding Resorts) Occupancy Rate	58.8%	65.9%	69.5%	67.2%	68.8%	70.6%	70.3%	75.0%	**73.8%**				**69.1%**
Point Change from 2013	2.0	-0.6	0.8	-1.2	1.6	0.6	-2.1	1.5	**-0.9**				**0.4**
Average Daily Room Rate	$137.42	$140.16	$140.38	$142.06	$141.46	$149.38	$149.08	$137.75	**$146.20**				**$142.69**
Variance from 2013	3.1%	4.0%	4.5%	3.1%	3.1%	5.8%	2.2%	3.7%	**5.2%**				**3.7**

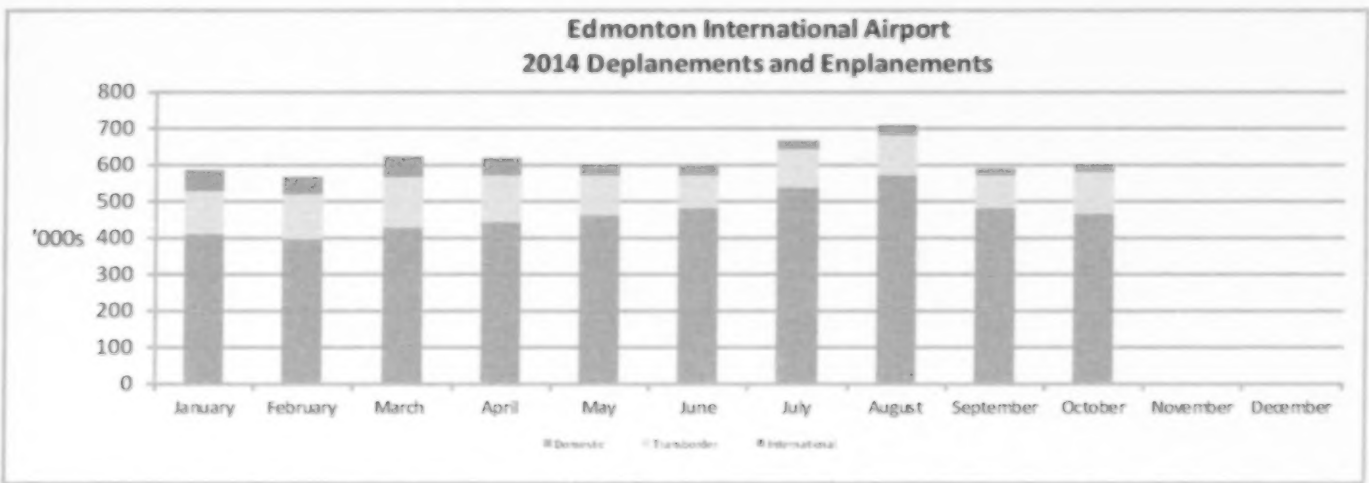
*Includes Lethbridge, Red Deer and other Alberta communities. Source: PKF Consulting Inc.

Alberta Government

Air Passengers 2014 (enplanements and deplanements)

Calgary International Airport reported that in September 2014, 1,263,578 passengers either boarded or deplaned at the airport, a +6.1% increase compared to September 2013 (1,191,475). For year-to-date 2014, 11.56 million passengers either boarded or deplaned at the airport, a +7.2% increase. For year-to-date 2014, domestic passengers are up +7.4%, transborder passengers are up +6.9%, and international (overseas) passengers are up +6.3%. Edmonton International Airport reported that in October 2014, 597,657 passengers either boarded or deplaned at the airport, a +5.2% increase compared to October 2013 (568,289). For year-to-date 2014, 6.15 million passengers either boarded or deplaned at the airport, a +5.9% increase. For year-to-date 2014, domestic passengers are up +4.3%, transborder passengers are up +9.6%, and international (overseas) passengers are up +16.3%.

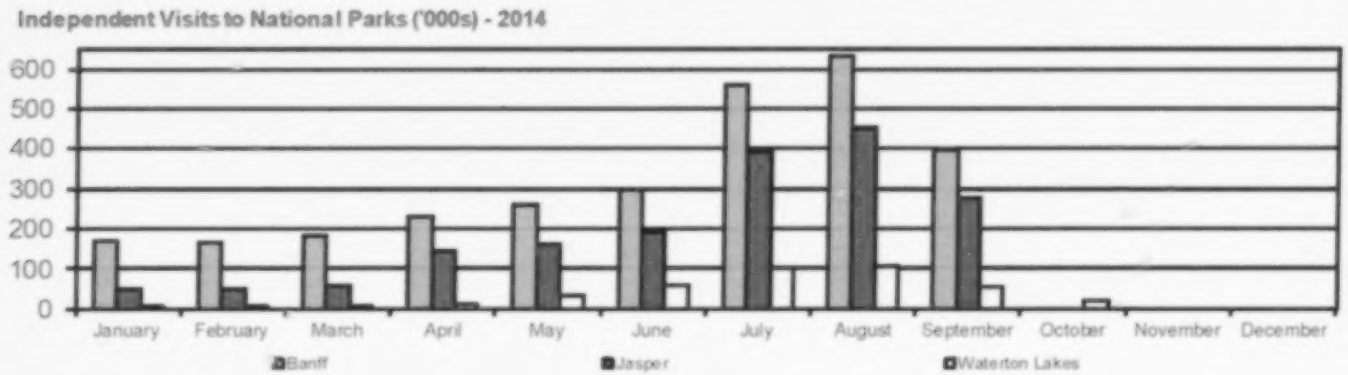




Source: Edmonton International Airport and Calgary Airport Authority

National Park Attendance 2014 ('000s of person-visits) Group Tours not included

For September 2014, independent visits to Jasper National Park were 275,680, an increase of +1.5% compared to September 2013 (271,736). For year-to-date 2014 (January - September), independent visits to Jasper National Park were 1.8 million, an increase of +5.4% over the same period last year.
For October 2014, independent visits to Waterton Lakes National Park were 18,406, an increase of +7.0% compared to October 2013 (17,242). For year-to-date 2014 (January - October), independent visits to Waterton Lakes National Park were 0.4 million, an increase of +1.5% over the same period last year.



Source: Parks Canada

Historic Sites and Museums 2014 ('000s of person-visits)

2014	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Y-T-D Total
Visitor Attendance	23.5	39.8	38.5	47.5	77.5	115.5	160.5	188.9	59.4	**40.1**			**791.2**
% Change from 2013	10.9%	-6.8%	-9.7%	11.4%	3.8%	14.3%	1.3%	4.4%	-14.3%	**-0.2%**			**2.2%**

Source: Alberta Culture and Tourism, Heritage Division.

Employment 2014 ('000s of persons)

Employment in the Accommodation, Food and Beverage sector in Alberta increased +5.8% in October 2014, compared to October 2013. Year-to-date 2014, average employment in the Accommodation, Food and Beverage sector in Alberta increased +8.0%.

Preliminary-Seasonally Adjusted	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average Y-T-D Total
Accommodation, Food and Beverage	149.2	148.9	148.5	148.9	149.2	132.3	134.1	131.8	143.3	**153.8**			**144.0**
% Change from 2013	15.5%	14.9%	24.1%	18.0%	13.5%	-0.6%	-0.6%	-5.1%	-1.1%	**5.8%**			**8.0%**

Source: Statistics Canada, Labour Force Survey.

Food Services and Drinking Places 2014 ($ Millions)

According to results from Statistics Canada's Food Services and Drinking Places survey, Alberta's unadjusted total receipts for August 2014 were up +8.1% to $777.6 million, compared to August 2013 ($719.2 million).

Preliminary	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average Y-T-D Total
Total Receipts for Alberta	$648.7	$628.3	$715.3	$713.9	$758.3	$745.0	$764.8	$777.6					$719.0
% Change from 2013	5.3%	2.7%	5.2%	8.2%	8.1%	6.4%	6.7%	8.1%					6.4%

Source: Statistics Canada, Food Services and Drinking Places (Unadjusted)

Highway Traffic Count ('000s of Vehicles) 2014

Preliminary	Hwy 1—Sask border w-bound	% Change from 2013	Hwy 1—Banff Pk Gate (2 way)	% Change from 2013	Hwy 16– Jasper Pk Gate (2 way)	% Change from 2013	Hwy 16—Jct #897 w-bound	% Change from 2013
January	55.9	1.1%	473.0	3.4%	91.8	2.1%	169.6	2.8%
February	56.0	0.0%	449.1	-4.9%	84.7	-2.0%	157.6	-1.6%
March	62.3	-2.2%	499.1	-6.8%	105.2	-6.8%	182.7	3.7%
April	71.5	9.2%	532.4	15.8%	124.6	16.1%	187.5	4.8%
May	77.3	-1.7%	586.2	1.1%	139.5	2.3%	200.7	0.2%
June	83.6	8.2%	659.8	44.1%	162.0	-8.1%	200.0	0.7%
July	104.0	0.9%	881.7	12.7%	224.4	5.3%	219.9	2.3%
August	**110.5**	**1.7%**	**982.6**	**4.8%**	**264.8**	**7.1%**	**223.3**	**0.8%**
September	**79.2**	**-1.6%**	**645.7**	**-1.3%**	**154.4**	**-1.0%**	**202.5**	**0.3%**
October								
November								
December								
Year-To-Date	**700.3**	**1.7%**	**5,709.6**	**7.0%**	**1,351.4**	**2.0%**	**1,743.8**	**1.5%**

Source: Alberta Transportation.

Definitions of Indicators

Air Passengers—Data are preliminary estimates of the number of air passengers enplaning and deplaning. Source: Calgary Airport Authority and Edmonton International Airport (websites).

Highway Traffic—These data are monthly totals. The monthly average daily traffic (average number of vehicles per day) is calculated by dividing the monthly total by the number of days in the month passing the counter locations and in the direction indicated for a particular month. Automatic Traffic Recorders count all vehicles by direction. Year-to-date is a cumulative total for all vehicles. Source: Alberta Transportation's Automatic Traffic Recorders (ATR).

Accommodation Indices—Occupancy rates and average daily room rates are based on a sample of hotels for each respective location. Source: PKF Consulting Inc. with reproduction and use of information subject to PKF Disclaimer and Restrictions as detailed at www.pkfcanada.com.

Historic Sites and Museums—Visitor attendance figures are monthly totals based on fifteen historic sites, the Royal Alberta Museum, the Royal Tyrrell Museum of Paleontology, and the Tyrrell Field Station. Source: Alberta Culture and Tourism, Heritage Division.

National Park Attendance—Attendance is reported as the number of independent visits to National Parks in Alberta. Data are preliminary unless otherwise noted. Beginning in 2004, the monthly figures for Banff National Park and Jasper National Park reflected independent travellers only, and do not include people travelling as part of a tour group. The tour group data, however, are included in the annual total. Source: Parks Canada.

Employment in the Food and Accommodation Sector—The employment figure represents all persons 15 years or older who worked for pay or profit or unpaid work in the food services and accommodation sectors, including businesses or other ventures owned or operated by a related family member(s) during the reference period of the survey. The year-to-date figure is an average for the year. Employment figures are seasonally adjusted.
Source: Statistics Canada, Labour Force Survey.

Food Services and Drinking Places—The monthly survey provides estimates of the value of sales and the number of locations of restaurants, caterers, and drinking places by province and by industry at the North American Industry Classification System (NAICS) four-digit level. Includes total receipts from restaurants, caterers and taverns for chain and independent establishments. The target population includes full-service restaurants, limited service eating places, special food places and drinking places. Data are unadjusted. The year-to-date figure is an average for the year.
Source: Statistics Canada, Food Services and Drinking Places, CANSIM table: 355-0006.

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